

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Glenda Humphries (CONS/P)

Case No. 0279066

Hubbell, Marlene A. (for Tony Dwayne Marsh – Nephew – Petitioner)

Petition for Appointment of Joint Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

	Aff.Sub.Wit.	П	
Ě	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of	Х	
	Hrg		
~	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
~	Conf.		
	Screen		
	Letters	Х	
>	Duties/Supp		
	Objections		
	Video	Х	
	Receipt		
	CI Report		
	9202		
~	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Atty

NO TEMP REQUESTED

TONY DEWAYNE MARSH, Nephew, is Petitioner and request appointment as Co-Conservator of the Person with medical consent powers under Probate Code §2355 (joint with current conservator MAXINE MARSH).

MAXINE MARSH, Sister, was appointed Successor Conservator with medical consent powers on 7-15-03.

Petitioner states this petition is brought with the knowledge, consent and approval of Maxine Marsh in the event of inability of Maxine Marsh to continue in the future due to her increasing age and physical condition, and to aid in continuity of care of the Conservatee in the future such that care is not delayed or absent due to lack of an individual in the position of conservator. Consent by Maxine Marsh for Petitioner to Act as Joint Conservator was filed 10-30-14. Petitioner also requests the Court take judicial notice of various prior orders in this matter.

Court Investigator Julie Negrete to file report.

NEEDS/PROBLEMS/COMMENTS:

Note: DARLINE FRAME, CAROLYN ROMANENKO, and ALINE WHITE, Sisters, filed a petition for appointment as successor co-conservators on 11-12-14 which was set for hearing 12-15-14.

Court Investigator to advise rights, file report.

Voting rights affected – need minute order

- Petitioner filed Proof of Service instead of the <u>mandatory</u> Judicial Council Notice of Hearing Form GC-020. The Court may require amended service using the mandatory form, which contains language pursuant to Probate Code §1211.
- 2. Need video receipt per Local Rule 7.15.8.A.
- The Conservatee is developmentally disabled pursuant to Probate Code §1420. Therefore, need notice to CVRC pursuant to Probate Code §§ 1822(e), 1461.4.
- 4. Need Letters.

Reviewed by: skc

Reviewed on: 12-8-14

Updates:

Recommendation:

File 1 - Humphries

1

Bagdasarian, Gary G. (for Maler Ali Tareb – Administrator)
Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

_		sidius rearing ke: Filing of the First Accou	
DC	D: 08/14/11	MALER ALI TAREB, son, was appointed as	NEEDS/PROBLEMS/COMMENTS:
		Administrator on 07/03/13. Letters of	
		Administration were issued on 07/03/13.	CONTINUED FROM 09/23/14
		╡	
		Final Inventory & Appraisal filed	
	nt. from 090514	07/15/13 - \$85,000.00	 Need Account/Report of
092	2314		Administrator and Petition for
	Aff.Sub.Wit.	Status Report filed 09/17/14 states: the	Final Distribution.
	Verified	sole asset of the estate is real property	
	Inventory	located on S. Winery in Fresno. The	
	PTC	Administrator has been working with Wells Fargo Bank on adjusting the loan	
	Not.Cred.	amount secured by the real property in	
✓	Notice of	order to allow a sale of the property in	
	Hrg	an amount that would benefit the	
✓	Aff.Mail	estate. However, discussions in this	
	Aff.Pub.	matter and the amount of	
	Sp.Ntc.	documentation provided to Wells Fargo have been more extensive than	
	Pers.Serv.	anticipated, although it is expected	
	Conf.	that their approval will be forthcoming	
	Screen	shortly. A 90 day continuance is	
	Letters	requested.	
	Duties/Supp		
	Objections		
	Video	7	
	Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		Reviewed by: JF
	Status Rpt		Reviewed on: 12/09/14
	UCCJEA		Updates:
	Citation	<u> </u>	Recommendation:
	FTB Notice		File 4A - Tareb

4A

Ali Nagi Tareb (Estate) Case No. 13CEPR00452 Atty Bagdasarian, Gary G. (for Maler Ali Tareb – Administrator) Order to Show Cause

DOD: 08/14/11		MA
		as .
		Ad
		Fine
Cont. from 09231	4	07/
Aff.Sub.Wit.		
Verified		Mir
Inventory		mc ap
PTC		Ord
Not.Cred.		\$10
Notice of		, i
Hrg		Cle
Aff.Mail		09/
Aff.Pub.		Ord we
Sp.Ntc.		09/
Pers.Serv.		077
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

4B

ALER ALI TAREB, son, was appointed Administrator on 07/03/13. Letters of ministration were issued on 07/03/13.

al Inventory & Appraisal filed /15/13 \$85,000.00

nute Order from 09/05/14 set this atter for hearing and states: No pearances. The Court orders an der to Show Cause with Sanctions of 00.00 for Mr. Bagdasarian.

erk's Certificate of Mailing filed /05/14 states that a copy of the der to Show Cause and Minute Order ere mailed to Gary Bagdasarian on /05/14.

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 09/23/14 Minute Order from 09/23/14 states: Mr. Bagdasarian apologizes for not appearing at the last hearing and explains it was a scheduling issue.

Reviewed by: JF **Reviewed on:** 12/09/14 Updates: **Recommendation:** File 4B - Tareb

4B

6 2013 Walter Edward Eastwood Revocable Trust Case No.14CEPR00069

Atty LeVan, Nancy J. (for Susan Brown -

Probate Status Hearing RE: Filing Final Accounting

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:	1	
	1	OFF CALENDAR
		First and Final Account was settled
Cont. from	1	on 1-28-14. This appears to have
Aff.Sub.Wit.		been calendared in error.
Verified		
Inventory	1	
PTC		
Not.Cred.		
Notice of		
Hrg	=	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video	7	
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 12/09/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 6 - Eastwood

6

Krause, Stephanie J. (for Petitioner Anita Payne)

Petition to Compel Trustee to Account and Declaration of Stefanie J. Krause in Support of Same

	ert H. Brown		ANITA PAYNE, Daughter and Beneficiary, is	NEEDS/PROBLEMS/COMMENTS:
Tinr	D: 6-23-11 nie Lee Brown		Petitioner.	Note: Co-Trustees' First Account was filed 11-10-14 and is Page B of
DO	D: May 2008		Petitioner states she is a beneficiary of the Brown Living Trust dated 11-22-91 executed by Albert H. Brown and Tinnie Lee Brown on 11-22-91 and amended in its entirety on 3-	this calendar.
Coi	nt from 102114	ļ	23-07. Tinnie Lee Brown died in May 2008.	
	Aff.Sub.Wit.		Albert H. Brown died on 6-23-11.	
>	Verified			
	Inventory		After the death of Albert H. Brown,	
	PTC		PAMELA BOLEN and GLEN BROWN became and currently are the trustees of the trust.	
	Not.Cred.		Both are residents of Fresno County, CA,	
>	Notice of		and the principal place of administration of	
	Hrg		the trust is Fresno County.	
>	Aff.Mail	W		
	Aff.Pub.		Petitioner states that other than an accounting on 5-29-08 (when Albert H.	
	Sp.Ntc.		Brown was trustee), the current trustees	
	Pers.Serv.		have never provided Petitioner with an	
	Conf.		account of the trust. On 4-9-14, 5-8-14,	
	Screen		6-23-14, 7-1-14, and 7-24-14, Petitioner	
	Letters		demanded that the trustee provide	
	Duties/Supp		Petitioner with an account. See attached exhibits including letters and emails. To	
	Objections		date, the trustee has failed to prepare and	
	Video		provide Petitioner with an account for any	
	Receipt		period after 2008.	
	CI Report			
	9202		Petitioner requests that: 1. Pamela Bolin and Glen Brown be	
~	Order		instructed to prepare and file with this	Reviewed by: skc
	Aff. Posting Status Rpt		Court an account of the Brown Family	Reviewed by: SRC
	UCCJEA		Trust since 6-23-11;	Updates:
	Citation		2. Pamela Bolin and Glen Brown be	Recommendation:
	FTB Notice		instructed to petition this Court for the settlement of the account and give	File 8A – Brown
			notice of the hearing on the petition;	
			3. The Court order such attorney fees and	
			costs as may be allowable by law;	
			4. The Court order such other and further relief as it may deem proper.	
		•		

Roberts, Gregory J. (for Glen A. Brown and Pamela J. Bolin – Co-Trustees – Petitioners)

Co-Trustee's First Account and Petition for its approval; for Approval and Allowance of
Trustees' and Attorney's Fees and Costs and for Surcharge of Litigation Fees and Costs

	ert H. Brown D: 6-23-11		GLEN A. BROWN and PAMELA J. BOLIN, Co-Trustees, are Petitioners.	NEEDS/PROBLEMS/ COMMENTS:
Tinr	nie Lee Brown D: May 2008		Account period: 6-23-11 through 6-30-14 Accounting: \$436,061.28 Beginning POH: \$432,652.20 Ending POH: \$187,557.01 (\$6,057.01 cash plus residential real property on Sylmar in Clovis, Fresno	
>	Aff.Sub.Wit.		County, unimproved real property in Shasta County, and personal property items)	
	Inventory PTC		Co-Trustee Glen A. Brown: \$1,143.62 (\$1,500.00 less \$356.38 returned)	
>	Not.Cred. Notice of Hrg Aff.Mail	W	Co-Trustee Pamela J. Bolin: \$1,307.00 In light of the \$432,652.20 value of the assets at commencement of administration, Petitioners believes the total trustee fees of approx. 0.6% of the	
	Aff.Pub. Sp.Ntc. Pers.Serv. Conf.		total value are reasonable and ask that the Court approve the payment of these fees. Barrus and Roberts, PC: \$1,970.00 (paid during)	
	Screen Letters Duties/Supp Objections		account period) plus \$5,252.10 plus \$435.00 filing. Petitioners request the Court approve payment of the fees paid, plus the additional fees and costs as well as additional fees and costs incurred after 10-31-14 as billed to Petitioners. See Exhibit 2.	
>	Video Receipt CI Report 9202 Order		Petitioners state: Distributions were made as follows: \$2,500 each to eight of the trustors' grandchildren, \$60,000 each to Kathy Short and Dennis Brown, and \$62,000 to Glen A. Brown; however, Petitioners agree	
	Aff. Posting Status Rpt UCCJEA Citation		that Glen A. Brown shall return the excess distribution of \$2,000 to the trust. Distributions to the two remaining children of the trustors, Pamela J. Bolin and Anita Payne, have been agreed by them to consist of the proceeds from the sale of the	Reviewed by: skc Reviewed on: 12-9-14 Updates: Recommendation:
	FTB Notice		residence. The personal property items are to be distributed per the co-trustees' discretion. The remaining cash is to be used partially for repairs to the residence and remaining trust administration expenses. SEE ADDITIONAL PAGES	File 8B - Brown

Page 2

8B

Petitioners state on 8-23-13, Pamela J. Bolin, as Co-Trustee and with the prior knowledge and agreement of beneficiary Anita Payne, obtained a loan for \$30,000 from Ord Finance to pay what was inadvertently miscalculated as a deficiency in the total trust payment to beneficiary Glen A. Brown and to provide funds for repair of the roof at the Sylmar residence. Funds were distributed \$12,000 to Glen A. Brown (\$6,000 as a personal loan and \$6,000 on the mistaken belief that the trust still owed him \$6,000), \$3,000 to the trust checking account to pay for roof repairs, which still remain to be made, and the remaining \$15,000 retained by Pamela J. Bolin as an advance against her share of the net proceeds of the sale of the residence. Accordingly, in addition to the \$2,000, Glen A. Brown owes \$12,000 to Pamela J. Bolin in repayment of this amount.

Despite borrowing the money on behalf of the trust, Pamela J. Bolin and Anita Payne have agreed to personally pay all amounts owed under the note. During the remainder of 2013, Pamela J. Bolin paid \$175/month on the loan balance and Anita Payne paid \$125/month. During 2014, Pamela J. Bolin has made all of the \$300 monthly payments owed on the loan. Petitioners anticipate that upon the sale of the residence, all of the financial arrangements related to the residence will be equalized so that Pamela J. Bolin and Anita Payne receive equal trust distributions from the proceeds.

Unlawful Detainer Action filed against Deborah Payne: Petitioners state Deborah Payne, daughter of Anita Payne, was and is currently living in the residence and refuses to vacate the premises. Although the residence has been listed for sale, Deborah Payne has not only failed to maintain the residence in a condition to be shown to buyers, but has interfered with and effectively made impossible the showing of the residence to potential buyers. Accordingly, an unlawful detainer action was initiated as 14CECL07612, which is not yet resolved. Petitioners request the cost of this action, including attorney fees and costs be charged as a surcharge against Anita Payne's share. The surcharge funds shall reimburse the trust for funds expended for the action and funds advanced by others shall be reimbursed to them with the remainder of the surcharge.

Petitioners pray for an order as follows:

- 1. Settling and allowing the account and report and approving and confirming the acts of Petitioners for the accounting period of 6-23-11 through 6-30-14;
- 2. Approving the payments made from the Trust for Trustees' fees in the amount of \$1,143.62 to Glen A. Brown and \$1,307.00 to Pamela J. Bolin;
- 3. Approving the attorneys' fees and csots of \$1,970.00 paid to Barrus and Roberts, PC, during the account period and the payment of \$5,687.10 to Gregory J. Roberts, representing additional attorney's fees and costs incurred and unpaid through 10-31-14, and the filing fee for the petition, and payment of fees and costs incurred hereafter;
- 4. Authorizing Petitioners to apply as a surcharge against the estate of Anita Payne in the Trust assets the fees and costs paid by the Trust to pursue and resolve the unlawful detainer action against Deborah Payne, as evidenced by attorney's bills and trust payments; and
- 5. For such other orders as the Court may deem proper.

Atty

Jones, Robert L

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:	7	
		CONTINUED TO 01/20/15
	1	Per request of counsel
Cont. from		·
Aff.Sub.Wit.		
Verified	1	
Inventory	1	
PTC		
Not.Cred.		
Notice of	<u> </u>	
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by:
Status Rpt		Reviewed on: 12/09/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 9 - Caudle

Neilson, Bruce A. (for Kathleen Wynn & Lisa Royce – trustees/Petitioners)

Petition to Determine Succession to Real Property (Prob. C. 13151)

			Tellion to belefitime 30ccession to kear froperty	-
DC	D: 07/22/13		KATHLYEEN M. WYNN and LISA ROYCE,	NEEDS/PROBLEMS/COMMENTS:
			trustees of THE MORSE TRUST, dated	1 This matter was filed using a
			03/03/06, are Petitioners.	 This matter was filed using a fee waiver. Filing fees are
				considered costs of
	ent. from		40 days since DOD.	administration and must be
<u> </u>				paid prior to distribution of
	Aff.Sub.Wit.		No other proceedings.	any assets. Therefore filing
✓	Verified		#1.40.000.00	fees totaling \$435.00 are now
✓	Inventory		I & A - \$140,000.00	due. See Page 10B.
	PTC		Will dated 03/03/06 devises estate to The	
	Not.Cred.		Morse Trust.	
✓	Notice of			
	Hrg		Petitioners request Court determination that	
✓	Aff.Mail	w/o	decedent's 100% interest in real property	
	Aff.Pub.		located 260 Meadow Lane, Kingsburg, CA pass to them as trustees of THE MORSE TRUST	
	Sp.Ntc.		dated 03/03/06 pursuant to decedent's will.	
	Pers.Serv.		dated 60,00,00 poisodini to decedent 5 wiii.	
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 12/09/14
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 10 - Morse
				10

11 Carmen Alvarado Moreno (Estate) Case No. 14CEPR01001

Atty Fanucchi, Edward L. (for Carmen C. Moreno – daughter/Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 08/30/96	CARMEN C. MORENO, daughter/named	NEEDS/PROBLEMS/COMMENTS:
DOD. 00/30/70	Executor without bond, is Petitioner.	NEEDS/TROBLEMS/COMMENTS.
	Executer williest beria, is the interior.	1. The Petition states that
	Full IAEA – OK	Edward Moreno,
	<u> </u>	decedent's grandson, is
Cont. from	Will dated 02/27/90	deceased. Need date of
Aff.Sub.Wit.		death pursuant to Local
✓ Verified	Residence: Fresno	Rule 7.1.1 D.
Inventory	Publication: The Business Journal	0 No od Oudou ou di Lottou
PTC	Estimated Value of the Estate:	2. Need Order and Letters.
Not.Cred.	Estimated Value of the Estate: Real property - \$16,500.00	
✓ Notice of	- \$10,000.00	
Hrg	Probate Referee: RICK SMITH	
	<u> </u>	
✓ Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
✓ Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 12/09/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 11 - Moreno

11

Theresa Rojas Sanchez (Estate)
Durost, Linda K. (for Pat Hernandez – Successor Administrator)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

	D: 12/19/12	AAANUEL BOIAS brother was appointed	
100	υ. IZ/ I7/ IZ	MANUEL ROJAS , brother, was appointed as Administrator of the Estate with Full	NEEDS/PROBLEMS/COMMENTS:
		IAEA and without bond on 02/14/13.	CONTINUED FROM 10/16/14
		Letters of Administration were issued on	COMMODITATION 10/10/14
		= 02/20/13.	
Col	nt. from 041814	02/20/10.	Need First Account and/or
071	814, 101614	Order on Ex Parte Petition to Amend	Petition for Final Distribution <u>or</u>
	Aff.Sub.Wit.	Petition for Probate filed 07/23/13	current written status report.
	Verified	ordered that Manuel Rojas file a bond	
	Inventory	in the amount of \$315,000.00. Bond was	
	PTC	later increased to \$400,000.00 by Ex	
	Not.Cred.	Parte Order to Increase Bond filed	
	Notice of	08/16/13.	
	Hrg	Bond was filed 08/26/13 and new	
╠═╬	Aff.Mail	Letters of Administration were issued to	
	Aff.Pub.	Manuel Rojas on 08/28/13.	
	Sp.Ntc.	1	
	Pers.Serv.	Administrator Manuel Rojas died on	
		12/08/13. Pat Hernandez, sister, was	
	Conf. Screen	appointed as successor Administrator	
		with bond in the amount of \$400,000.00 on 03/19/14. Bond was filed 03/25/14	
	Letters (Same	and Letters of Administration were	
	Duties/Supp	issued to Pat Hernandez on 03/25/14.	
	Objections	=	
	Video	Minute Order from hearing appointing	
\parallel	Receipt	Manuel Rojas as Administrator on	
	CI Report	02/14/13 set this matter for status	
	9202	regarding filing of the First	
	Order	Account/Petition for Distribution.	
	Aff. Posting	_	Reviewed by: JF
	Status Rpt	_	Reviewed on: 12/09/14
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 15 – Sanchez

Kassandra Dominque Higgins (GUARD/E) Case No. 14CEPR00133 Kruthers, Heather H. (for Public Guardian – Guardian of the Estate)

Status Hearing

17 Atty

Sidios frediling		
Age: 17	PUBLIC GUARDIAN, was appointed Guardian	NEEDS/PROBLEMS/COMMENTS:
	of the Estate on 03/26/14. Letters of	
	Guardianship were issued on 03/26/14.	CONTINUED FROM 07/28/14
	Minute Order from hearing on 03/26/14 set	
	this matter for a status hearing on 07/28/14.	 Need Inventory &
0 11 0 0 0 0 0	 	Appraisal.
Cont. from 072814	Status Report Re: Guardianship filed 07/10/14	
Aff.Sub.Wit.	by the Public Guardian, states: The Public Guardian has received a one-time lump sum	
Verified	payment in the amount of \$20,242.05 from	
Inventory	the Defense Finance and Accounting	
PTC	Service, covering the period from 04/15/13 – 03/31/14. In addition, the Public Guardian	
Not.Cred.	received a lump sum payment in the	
Notice of	amount of \$5,763.80 from the Survivor's	
Hrg	Benefits Plan (SBP). These are funds from her	
Aff.Mail	deceased father's SBP, which is an annuity. Her monthly reapportioned annuity amount	
Aff.Pub.	is \$1,941.00 with \$175.77 set aside for federal	
Sp.Ntc.	taxes, thus netting \$1,765.23. The minor also	
Pers.Serv.	receives a monthly amount of \$520.70 dependency indemnity compensation from	
	the Veterans Administration, which stops on	
Conf.	her 18 th birthday. Further, it appears that the	
Screen	minor receives Social Security, which is	
Letters	currently being used to pay her Child	
Duties/Supp	Protective Service (CPS) care. The amount	
Objections	she receives is not known because it is paid directly to CPS. As of 06/27/14, the amount	
Video	in the minor's Public Guardian trust account	
Receipt	is \$29,672.21. The Public Guardian sends the	
CI Report	minor \$300.00 per month for personal needs. In addition, Kassandra has been awarded	
9202	the Fry Scholarship, which is part of the post	
Order	911 GI Bill given only to qualified children of servicepersons that died while on active	
Aff. Posting	duty. The amounts of the post 18th birthday	Reviewed by: JF
Status Rpt	remuneration are unclear and Deputy	Reviewed on: 12/09/14
UCCJEA	Harper has called, but has been informed that a signed release is needed from the	Updates:
Citation	minor before any info can be released. The	Recommendation:
FTB Notice	guardianship will terminate by operation of	File 17 - Higgins
	law on the minor's 18th birthday on 10/16/14.	
	Therefore, it is requested another status	
	hearing not be set before December 16, 2014 to allow the Public Guardian time to	
	prepare and file her final account for the	
	guardianship.	